

Fiercely devoted to your financial prosperity

Chart of the Month: China's Response to U.S. Tariffs

INTRODUCTION TO **CAISSA** *(Ky-Suh)*

...named after the Roman Goddess of Chess

People have many complex 'pieces' on their financial board of life and we analyze every detail to create wealth strategies that are fully integrated and think 10 steps ahead, much like one would do to win in chess.

With CAISSA as your advisor, you will find we are fiercely devoted to your financial prosperity so you can be fully devoted to your personal wellbeing. We execute smart strategies thoroughly...making our clients' retirement visions REALITY.

CAISSA Wealth Strategies – a Fee-only fi...



Wealth Management

Financial Planning

Investment Management

Insurance (Disability, Life, Long Term Care)

Estate Planning

Divorce Planning

Executive Plans

Tax

Strategies

Social Security

Health Care

Education / College Planning.

Wealth Management ▼

OUR PHILOSOPHY

We know that successful financial planning requires an understanding of you and your unique situation. That's why we provide unparalleled attention to you, the client, as we develop smart strategies to help you understand your finances and plan ten steps ahead. **The day you start working with CAISSA is the day you stop worrying about your finances.**

Investments are only as strong as the financial plan that directs them. That's why our clients receive a personalized plan that integrates their whole financial picture and is updated regularly. Using this plan as the driver, we create a detailed **torpedo-proof investment strategy** that meets your goals and long-term plans.

As a fee-only investment firm, our motivation is simply to give you the best service possible.

Our expertise matched with our fierce loyalty to our clients' prosperity is the reason clients stay with CAISSA long-term.


HOW DOES CAISSA SERVE ITS CLIENTS?

Consider CAISSA your personal Chief Financial Officer. We use **three key processes** to guide our work:



Torpedo Proofing

Repeatedly Stress testing for potential toxic events, or 'Torpedoes,' (such as market downturns, death, disability, rising healthcare costs or outliving your assets) that could derail our plan.



Tranches of Income

An overlay process to analyze our investment allocations by segmenting future withdrawal needs into three 'Tranches,' or timeframes, and determining the amount of assets needed for the investment portfolio to appropriately fund each tranche, reducing anxiety about getting through the next market dip.



On-Site Investment Due Diligence

Personally vetting our managers at their place of business garners valuable insight otherwise not ascertained in a standard data report. Only face to face can we truly solidify our understanding of the investments we own.

SEE OUR SERVICES

WHAT WE STRIVE FOR YOU TO FEEL WHEN WORKING WITH CAISSA

+ The day we hired CAISSA is the day we stopped worrying about finances.

We leave every meeting knowing how much we can spend, what returns we need to achieve, how long our assets will last and what would happen if we had an unforeseen incident.

+ CAISSA is fiercely loyal to their clients' prosperity.

+ The financial planning process is invaluable.

+ The CAISSA "Tranches of Income" approach helped us connect the dots.

+ We had no idea what we were missing with our last advisor until we started working with CAISSA.

+ CAISSA has earned our trust.



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